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Congratulations You have been asked to -a project!



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QUICK ACTIVITY: Write Down a Project

Directions: In Magic Marker in very large letters, please write the name of a project assigned to you.

PROJECT = Has a start date and an end date (not ongoing work)



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Group Activity: Construct a Project Plan

- We will construct a sample project plan together using a worksheet. You will fill in your project plan that connects back to your project.
- We will introduce terminology as we go (milestones, phases, deliverables, stakeholders, pilot, etc.). Don't get hung up on terms right now, just focus on the concepts.



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Project Plan Worksheet

II. Project Organization

Indicate all project team members and how frequently you will communicate with them.

Project Manager Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives	Sponsor The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project				
Peyri Herrera	Terry Loftus				
Steering Committee Weekly Bi-Weekly Key people that assist the project manager in making decisions and moving the project forward Monthly As Needed	Stakeholders Weekly Bi-Weekly An individual, group, or organization that may affect or be affected by outcome of the project Monthly As Needed				
Beckie Benson, John Vaillancourt, 3 CAB Members TBD	All districts/charter schools that use PeopleSoft				
Project Team Weekly Bi-Weekly Supports the project manager in performing work Monthly As Needed of the project to achieve its objectives As Needed	Others Involved Weekly Bi-Weekly List anyone else who will be involved and state Monthly As Needed their roles As Needed				
10 District Representatives ("Conference	SDCOE ITS Teams: Services & Solutions, Enterprise				
Committee"), Sally Morton, Lori Free-Trout, Barbara	Applications, Media & Creative Services; M&O				
Thiss, Kimberly Harrison, Becky Fino, Von Nguyen, Anthony Rodgers, Joan DeKoven	District Speakers; PeopleSoft CAB; Vendors				



III. Project Details

Project Description

Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?

This project is to design and execute "district-driven" PeopleSoft user conference in late October 2020. The purpose is to bring PeopleSoft users together to discuss best practices, share ideas, and network with district peers. This is the 4th year of the conference so our aim is to make it "bigger and better."

Scope

Who/how many this will impact? What is included (or not included) that can help manage the expectations?

One day event for all PeopleSoft Districts – this is for approximately 350-500 users (based on venue).

Objectives/Success Criteria

How will you know if the project was a success? List what you are trying to accomplish and the success criteria.

We will have at least 40 districts/charter schools attend; at least 20 districts will be involved with presentations; 80% or more will rate the conference an "A" or "B" letter grade; the conference will be executed as well as or better than the last three years

Deliverables Which products or results do you expect upon completion of the project?

We will deliver 1 conference with 20-30 sessions (TBD); 1 webpage; 1 scheduling application; 1 video

Risks

List the things that you think could be risks to the success of the project. If possible, list the mitigation strategy for each risk.

Risks: Funding and Participation. We will need vendor sponsorship so this can be a free event; if we do not obtain the funding, we will need to ask districts to pay and/or ask the Sponsor for funds. For a successful event, we need the majority of districts to attend; CAB and Conference Committee involvement is crucial, as well the help from the SDCOE PeopleSoft Support Team for outreach and communications. 7

IV. Project Schedule & Milestones

Based on your needs, list either the phases and/or major milestones of the projects. Include start and end dates.

		, ,		
Ph	ase/Major Milestone	Responsible (Lead)	Start Date or Month Begin	End Date or Month End
1.	Big Picture Planning (Venue, Theme)	Sally, Conf Committee February		March
2.	District Survey and Finalize Sessions/Topics	Sally, Conf Committee	March	April
3.	Webpage & Announcements	Barbara	April	October
4.	Brochure and Online Registration Form	Barbara	May	June
5.	Registration	Lori	July	August
6.	Content Creation (1 subcomm per topic)	Kimberly + Subcomms	July	Mid-October
7.	Vendor Sponsorship & Donations	Kimberly	July	October
8.	Food	Lori	July	October
9.	M&O Items (Parking, Rooms, Tables)	Lori	August	October
10.	Graphics Orders	Lori	August	October
11.	Tech (including Sched app)	Becky	August	October
12.	Music (Andrew)	Becky	August	October
13.	Opening and Closing Sessions	Barbara	August	October
14.	Support Teams	Sally	August	October
15.	Video Plan	Kimberly	August	October
16	Master Schedule (Day Of)	Barbara	September	October
17	. Close Out Activities (including Evaluation)	Peyri/Sally	October	November 8



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4 QUESTIONS TO ASK YOURSELF

With whom do I need to communicate?

- Project Team
- Stakeholders
- Steering Committee

How often am I communicating?

Every Week, Bi-Weekly, Monthly

What is the agreed upon method of communication?

- In person (team meeting, standup meeting, 1:1)
- Email
- Skype
- Phone conference

What am I communicating?

- Status Report
 - Accomplished Tasks/Activities
 - Tasks/Activities that need to be completed
 - Potential Risks/Roadblocks and Mitigation



BEST PRACTICE #2

Communication is a key to a successful project.



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Sample PROJECT STATUS REPORT: [PROJECT NAME] Stoplight selectable with descriptions REPORTING PERIOD **Status** PROJECT START/ RISKS / ROADBLOCKS END DATE OBJECTIVE POTENTIAL RISKS Report SPONSOR ON TRACK PROJECT LEAD STEERING COMMITTEE ACCOMPLISHMENTS TASK/ACTIVITY NEXT STEPS TASK/ACTIVITY

POTENTIAL RISKS AND MITIGATION

RISK / ISSUE NAME	MITIGATION



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Communications Matrix

You can use a Communications Matrix to think through all the people/groups you should be communicating with from start to finish.

INFORMATION	DELIVERY METHOD	FREQUENCY	OWNER (Sender)	AUDIENCE (Recipients)
Kickoff Meeting	In person / Face-to-face	Once	Project Manager	Project team Sponsor, Stakeholders
Project Team Meetings	Stand-up or Conference call	Weekly	Project Manager	Project team
Monthly Status Meetings	Face-to-face or Conference call	Monthly	Project Manager	Project Stakeholders
Status Reports	Email	Monthly	Project Manager	Steering Committee



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Project Management Software

Project Management Task	Microsoft Office	Google	Other Software	
Project Document Management (repository)	OneDrive or SharePoint	Google Drive	dropbox.com box.com	
Project Plan	ect Plan Word		openproject.org monday.com asana.com	
Project Task Tracking	Excel or Planner	Google Sheets	<u>trello.com</u> <u>clickup.com</u> <u>todoist.com</u>	
Collaboration/ Communication Methods	munication Outlook, Skype		slack.com	
Status Reports	Word, PowerPoint	Google Docs, Google Slides	smartsheet.com	



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Excel Example

SAMPLE COLUMN HEADERS

	Exce	Activity Respo		Dat		Planning 201	Status		Dependencies	Notes
Fil		me Insert Data Review View Help		· · · ·	en in Desktop A	5				। 🗘 Share 🖓 Comments
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1	Activit -	_	-		-	End Date			Dependencies	▼ Notes ▼
50		Event Services: Graphic Design			oran bare, i	Lind Dutt	At Risk	Daratio		Multiple Activities Dependent on this
51		Theme Logo	Becky/Peyri			9/19/2019	Complete			Matapie Addities Dependent on this
52		PowerPoint Template	Becky/Peyri			9/19/2019	Complete			
53	9.3	Note-Taking Template	Becky/Peyri			9/19/2019	On Track			
54		Name Tag Design	Becky/Peyri			10/1/2019	On Track		Final Registration	
55	9.5	Pop-up Signage	Becky/Peyri			10/1/2019	Not Started		Vendor Solicitation	
56	9.6	Session/Room Posters	Becky/Peyri				Not Started			
57		Table Tents	Becky/Peyri/Graphic	s			Not Started			
	10.0	Event Services: Printing Materials					Not Started			Enough Time
	10.1	Place order for Brochure, materials, Signage, rent pop-up sta	Lori/Becky	Work with Graphics Tea		10/8/2019			Theme Logo and Donor Solicitation, Reg #'s	
		Proof	Kim H.	Work with Graphics Tea	10/9/2019					
		Event Services: Videographers - iTV					Not Started			Enough Time
		Provide Schedule of People and Sessions to record	Kim H.	Kim M		9/23/2019	On Track		Who to record & sessions	Decide which Sessions/People to reco
		Day-of support - escorte and check in to each session	Kim H.				On Track			Creation of Schedule
		Solicit volunteers for lunchtime interviews	Committee			9/23/2019	On Track		identifying who, registration	Set-up people to interview beforehan
		Microphones and Toss mic	Kim H.							
	12.0 12.1	Event Services: Communication				40/46/2040	On Track			Enough Time/Existing Template
		Internal to SDCOE - Parking	Stacy		10/14/2019	10/16/2019	On Track		Des deurs die en ede	Stacy will send announcement on 10/
	12.2	Common Ground	Stacy		10/14/2019	10/16/2019	On Track		Brochure, Logo, etc.	Other world in shade in shade in Manualatia
	12.5	Newsletter Yammer	Stacy Lori		10/14/2019 TBD	10/16/2019 TBD	On Track On Track			Stacy will include include in Newslette
		Event Services: Catering / Meals	LOIT		100	IDU	At Risk			Funding / Registration
		Breakfast	Kim M	Jason		10/24/2019	On Track		Funding / Registration	Ordered 10/1/19
		Lunch	Kim M	Joan		10/24/2019	On Track		Funding / Registration	Ordered 10/1/19
		Churros	Lori	Committee		10/24/2019			Funding / Registration	14
		J				20/2 / 2010	2			

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New Item 🗸	Search / Filter Board	0 0
Dependency	Date	🖉 Todoist Task
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	Feb 14	3671329115
t	Feb 14	3671417180
	Feb 13	3671417372
Dependency	Date Sep 17, 2019	🧉 Todoist Task
	Sep 20, 2019	
1	Feb 4	
Dependency	Date	💋 Todoist Task
t in the second s	Sep 6, 2019	
	Sep 6, 2019 Sep 28, 2019	
	New Item	New Item Search / Filter Board Dependency Date Peb 14 Feb 14 Feb 13 Feb 13 Dependency Date Dependency Date Sep 17, 2019 Sep 20, 2019



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Congratulation You're on your way to successful to successfully completing your project!



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PROJECT SUCCESS = On time, on budget, achieves objectives

With effective planning, communication, and tracking, you are on your way to successfully completing a project.



ON TIME ON BUDGET

ACHIEVES PROJECT OBJECTIVES



• 1: Plan •• 2: Communicate o 3. Monitor & Track

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Great resources for more information: pmi.org or projectmanagement.com